eFileTexas.gov

Review Queue User Guide

Copyright and Confidentiality

Contents

List of Figures

1 Review Queue Overview

The purpose of this document is to instruct the user on how to use the Review Queue.

The purpose of the Review Queue is as follows:

- To allow the user to review information associated with an e-filing.
- To process electronic filings (e-filings) and accept, reject, or forward them to another reviewer if needed.
- To annotate e-filings with text, highlights, and/or lines.

Figure 1.1 – Understanding the Review Queue Data Flow

2 Before You Begin

Topics Covered in this Chapter

♦ System Requirements

Before you begin, there are several items you should be aware of to assist you with the successful operation of your software.
Note: Depending on your setup, all features may not be available. As a result, your screen may vary from what is shown in the document.

System Requirements

This section describes the recommended system requirements to successfully use eFileTexas.gov.

- **Browser Requirements** – eFileTexas.gov supports current versions of the Windows operating system using Internet Explorer 7 or above or Firefox. If your browser does not meet these minimum requirements, please contact your network administrator.
- **Connection Requirements** – A high-speed Internet connection is recommended.
- **Minimum Screen Resolution** – For best results, a setting of 1024x768 or better is highly recommended. If necessary, users can set their monitors to 800x600 pixels, but doing so may compromise the graphic display.
- **Document Format** – PDF is the only format allowed for attaching documents when using eFileTexas.gov.

3 eFileTexas.gov Home Page

Topics Covered in this Chapter

♦ Logging into eFileTexas.gov

The eFileTexas.gov home page serves as the gateway to the eFileTexas.gov system. From this screen, you can register, log in, read your court's **Message of the Day**, access the user guides, view training sessions, and get contact information for Technical Support.

Figure 3.1 – eFileTexas.gov Home Page

Login

The **Login** area allows the user to log in and use the eFileTexas.gov system. Users can log in to eFileTexas.gov by entering their e-mail address and password.

Message of the Day

The **Message of the Day** provides important messages from the court. Check this section daily for important messages from the court.

Learn

The **Learn** section has links to the eFileTexas.gov user documentation. The following types of documents available to help you answer many of your day-to-day operation questions:

- The **eFileTexas.gov User Guide** provides step-by-step instructions on using the eFileTexas.gov system. The user guide covers activities such as logging in to the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and password.

- The **Firm Administrator Guide** is specifically for the Firm Administrator. This guides covers administrative functions such as registering the firm; managing user, payment, and attorney accounts; and creating and editing the firm's contact lists.
- The **Quick Reference Guide** (QRG) provides only the steps needed to complete common eFileTexas.gov tasks such as logging in to the system, searching for a case, initiating a new case, filing into an existing case, and reviewing the filing status.
- The **Frequently Asked Questions** (FAQ) guide lists the most frequently asked questions from the users. The FAQ covers questions pertaining to eFileTexas.gov functionality.

Training

eFileTexas.gov offers free regularly scheduled online training for eFileTexas.gov. You can register for training online and download user manuals.

- The **Web Conference Training Sessions** are scheduled according to the needs of the courts. Locate your specific court by scrolling through the list of training sessions for your court.
- **Self-study Online Training** is available by clicking on the link and choosing the topic of your choice.

Contact

The eFileTexas.gov Technical Support Team is available to assist all users by calling 855.839.3453 Monday through Friday between the hours of 7 a .m. to 9 p.m. Central Time. You can also contact a Technical Support Representative with your questions by sending an e-mail to efiling.support@tylertech.com or by using the eFileTexas.gov Chat option.

Registration

Registration is the process of registering a user in the system using their name, contact, and payment information. eFileTexas.gov requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

Logging into eFileTexas.gov

You can log in by using your e-mail address and password provided during the registration process. You must log in to be able to use eFileTexas.gov.

Note: Click Register Now to register if you have not registered to use eFileTexas.gov.

Perform the following steps to log in:

1. Go to your eFileTexas.gov home page.
2. Enter your e-mail address and password (case-sensitive) in the fields provided.

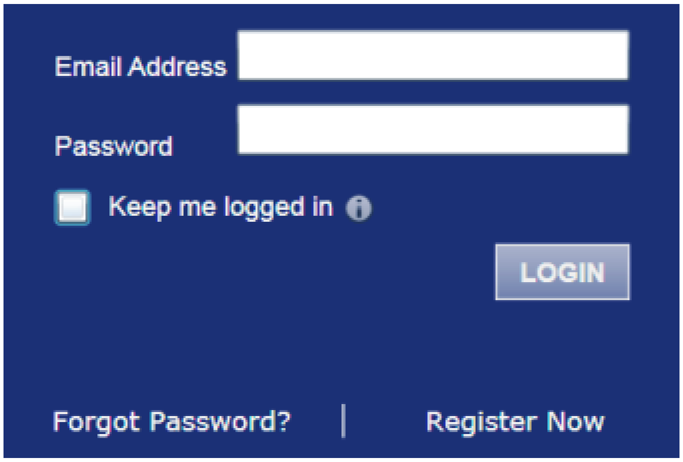


Figure 3.2 – eFileTexas.gov Login Area

3. Select the  check box to stay logged in to eFileTexas.gov. This keeps you logged in to eFileTexas.gov until you click the logout link to logout.
4. Click the  button.

Note: After several failed attempts to log in to the system, your account is locked. You can unlock your account by using the Forgot Password? option and reset your password without having to contact the Firm Administrator if a security question is associated with the account.

Once you have successfully logged in, you can begin to use eFileTexas.gov.

4 Accessing the Review Queue

Topics Covered in this Chapter

♦ Filtering the Review Queue

The Review Queue allows clerk reviewers to review cases.

You must have clerk privileges to access the Review Queue.

Perform the following steps to access the Review Queue:

1. Click the WORKSPACE link at the top of the page.

Figure 4.1 – Workspace Toolbar

2. Click the REVIEW QUEUE link on the toolbar.

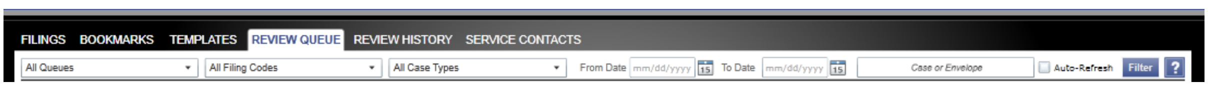


Figure 4.2 – Review Queue Selected

The **Review Queue** window opens.

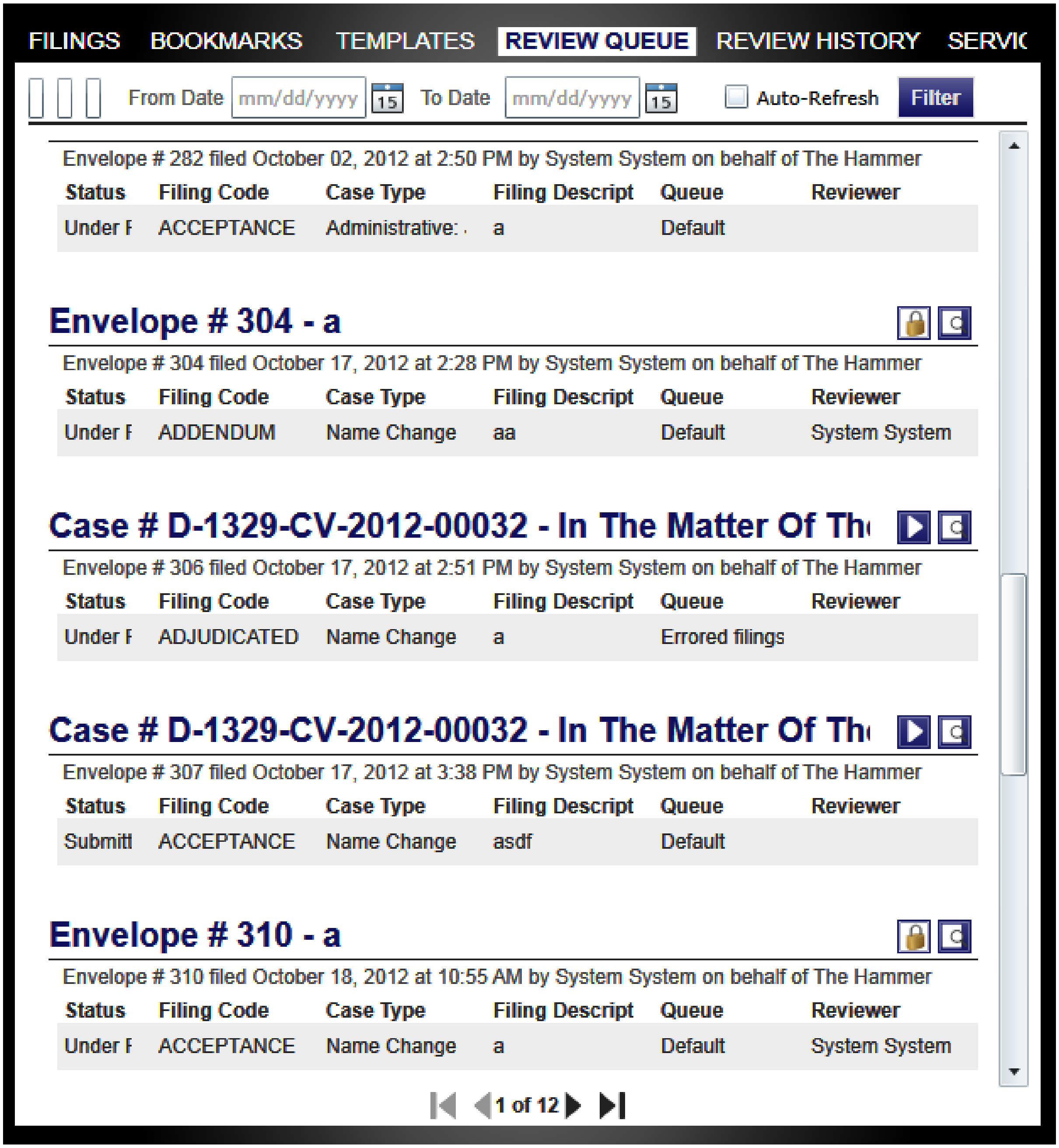


Figure 4.3 – Review Queue Window

3. Click the icon for the case you want to retrieve for review.

Note: You can filter the case in the queue by using specific parameters. Refer to Filtering the Review Queue, page 8 for more information.

The (Locked by User) icon displays on an envelope when another reviewer is reviewing the envelope or currently has the envelope open. **Note: Only the person reviewing the envelope or a system administrator can remove a lock.**

Filtering the Review Queue

Use the **Review Queue** filter to view only those filings that you require.

Note: Only you and your court may see this information.

1. Select the filter parameters using the drop-down lists or enter specific information in the search fields.

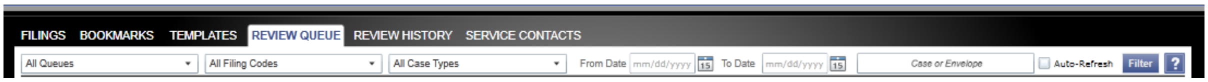


Figure 4.4 – Review Queue Filter

Note: For the From Date or the To Date, click the  **icon to select dates from a calendar, or you can type the dates manually (for example, `9/9/2010`).**

Figure 4.5 – Select the Dates Using the Calendar

2. Click  to filter the search.

Note: To clear the filter, select Review Queue on the toolbar.

A list of cases meeting your search criteria displays.

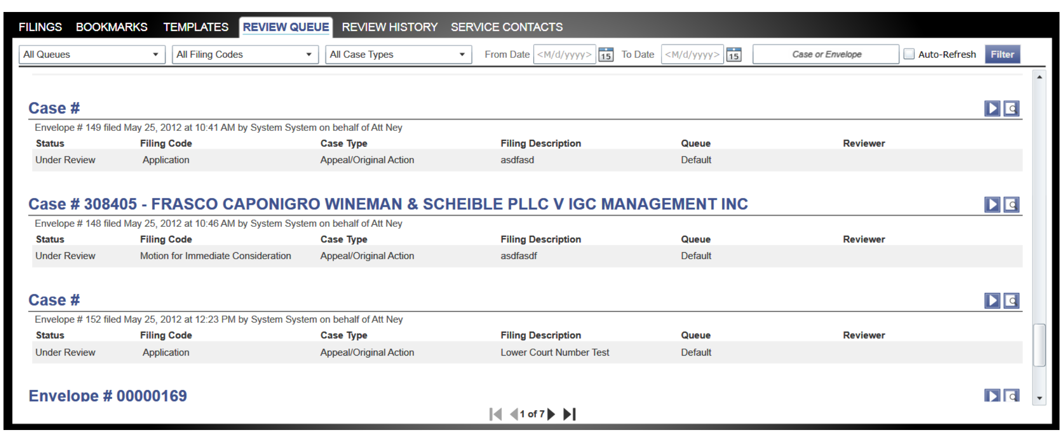


Figure 4.6 – Review Queue Screen

3. Click the  icon for the case you want to retrieve for review.

5 Edit Envelope Information

For new cases, envelope information can be edited by clicking the  button, located above the **Case Information** section.

Figure 5.1 – Edit and Verify Parties Toolbar

On subsequent filings, the party information cannot be edited. If you are reviewing a new case filing, review the submitted party information to confirm it is accurate before accepting the new case filing.

You can correct or extend the filing information based on the court procedures associated with e-filing or from information obtained within the documents submitted by the filer. For example, you can add an additional party referenced in the document to the filing, or you can correct the spelling of a party name to match the spelling in the submitted document.

You can also correct any of the filing domain items, such as case type or filing code.

6 Working in the Review Queue

Topics Covered in this Chapter

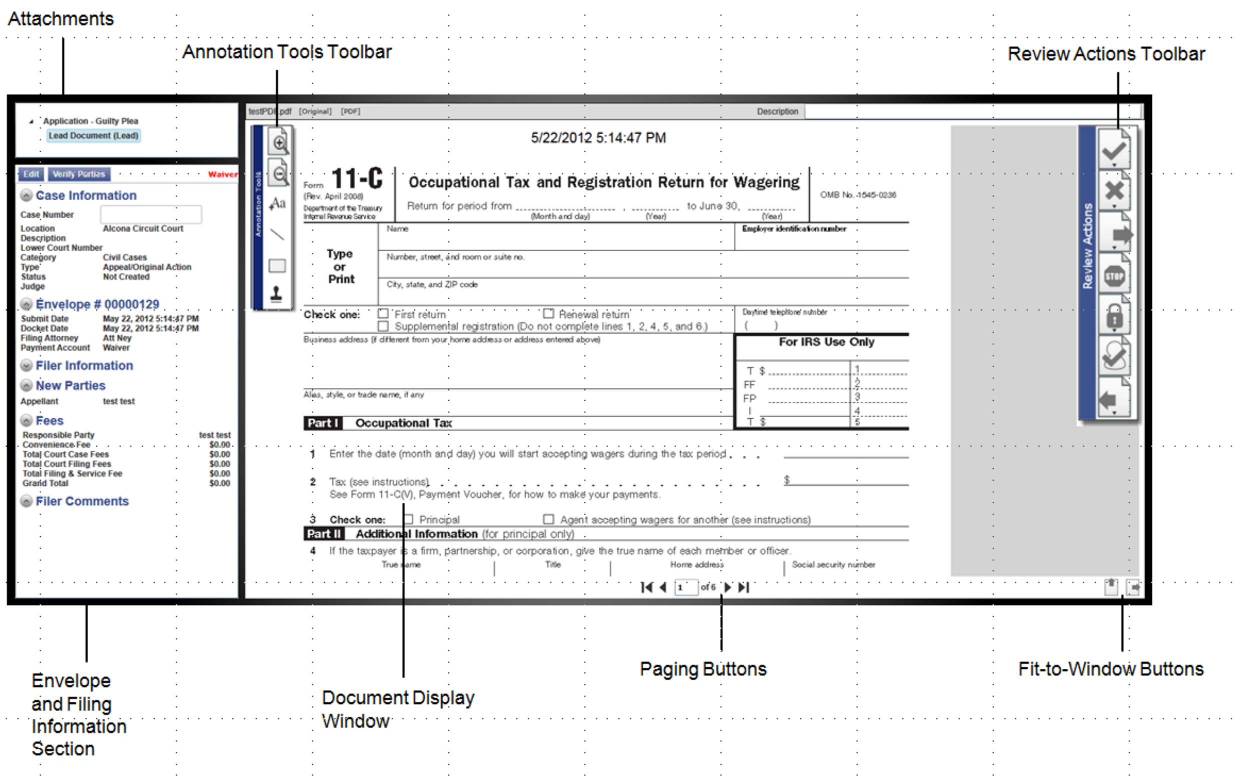
♦ Adding Annotations
♦ Review Envelope and Filing Information

When you select a filing to review, the **User Interface** window opens.

Review Queue Overview

This section describes the envelope and filing information sections, the document display window, the annotation tools, the review actions buttons, the paging arrows, and the fit-to-window arrows.

Figure 6.1 – Review Queue User Interface



Attachments

The **Attachments** section displays any documents attached to the envelope.

Envelope and Filing Information Section

The **Envelope and Filing Information** section displays the case information, the envelope information, the parties involved in the case, the fees association with the filing, and any filer comments.

Document Display Window

The **Document Display** window displays the currently selected filing document. This window contains the **Annotation Tools** toolbar, the **Review Actions** toolbar, paging arrows, and fit-to-window arrows.

Annotation Tools Toolbar

The **Annotation Tools** toolbar default location is on the upper left edge of the **Document Display** window. It provides tools to zoom in or out of the document or add text annotations, lines, highlights, and image stamps. Pause your mouse over a button to display a tooltip describing the button's function. Both the **Annotation Tools** toolbar and the **Review Actions** toolbar may be selected and moved anywhere within the **Document Display** window.

Review Actions Toolbar

The **Review Actions** toolbar default location is on the upper right edge of the **Document Display** window. It provides tools to accept the filing, reject the filing, forward the filing, end the review, change the document security, manually accept the filing, or send the filing back to filer. Pause your mouse over a button to display a tooltip describing the button's function. **Note: Toolbar options vary by site.**

Paging Arrows

The paging arrows allow you to access different pages in the document.

Note: You must use the paging arrows to navigate to a specific page. Review actions will vary depending on client site.

Fit-to-Window Arrows

The fit-to-window arrows allow you to modify the document display.

Adding Annotations

Use the **Annotation Tools** toolbar to add text annotations and lines to documents. You can also highlight text or upload and apply images on documents using the image stamps.

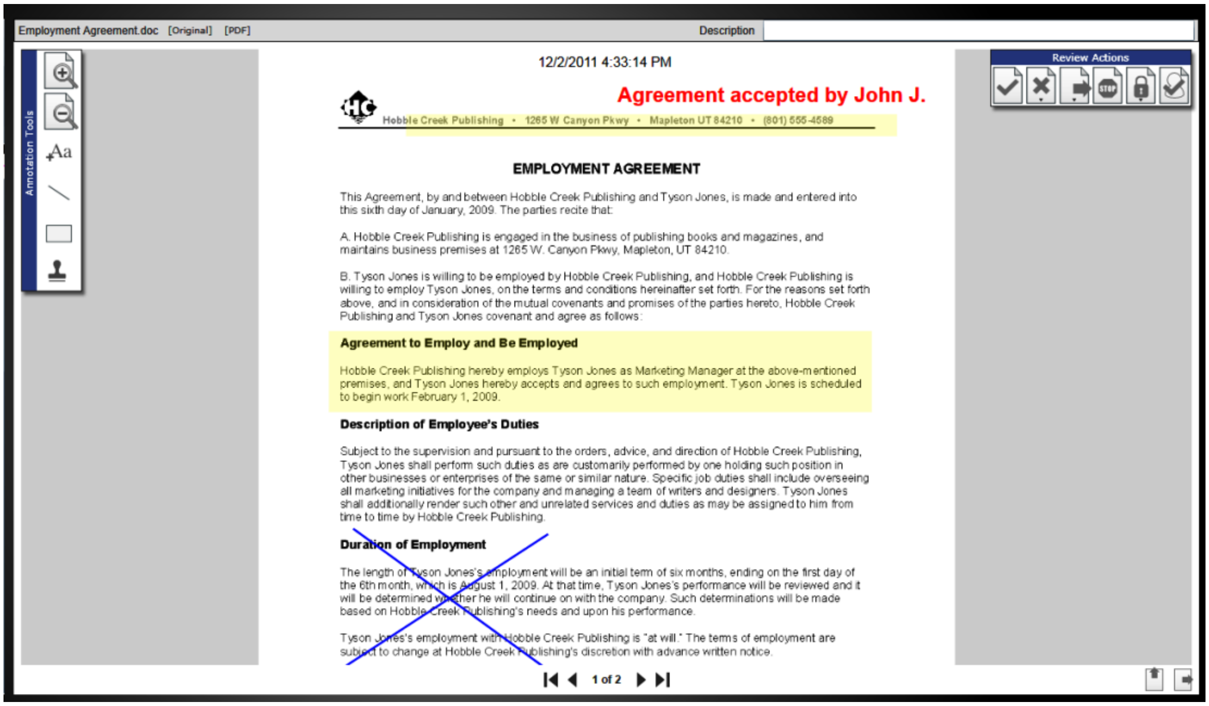


Figure 6.2 – Document Display Window with Annotations

Complete the following steps to add annotations:

1. Click  to add a text annotation. The text annotation dialog box opens. Use the text annotation dialog box to modify the font face, size, characteristics, and color.

Figure 6.3 – Modifying Text Annotations

2. Click  to add a line annotation to your document. The line annotation dialog box displays. Use the line annotation dialog box to modify the size and thickness of the line.

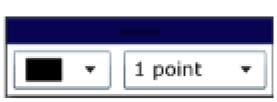
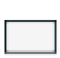


Figure 6.4 – Modifying Line Annotations

3. Click  to add a yellow highlight box to the document. Click and drag your mouse over the area you wish to highlight to draw the box.

4. Click to add the available image stamps options to the document.

   The image stamp gives the reviewer the ability to upload and apply images on documents during the clerk review process.

Figure 6.5 – Image Stamp Select Stamp Window

Zooming In and Out

Use the zoom buttons on the **Annotation Tools** toolbar to zoom in or out.

- Click to zoom in on the document.
- Click to zoom out from the document.

Paging Arrows

The paging arrows allow you to access different pages in the document.

Note: You must use the paging arrows to navigate to a specific page. Review actions will vary depending on client site.

- goes to the first page of the document.
- goes to the previous page.
- goes to the next page.
- goes to the last page.

Fit-to-Window Arrow Buttons

The fit-to-window arrow buttons allow you to modify the document display.

- The (fit-to-window arrow button) scales the image so that it fits the entire height of the *Document Display* window. The width automatically scales to the new height, ensuring the document's visual presentation is not distorted.

- The (fit-to-window arrow button) scales the image so that it fits the entire width of the **Document Display** window. The height automatically scales to the new width, ensuring the document's visual presentation is not distorted.

Review Envelope and Filing Information

The **Envelope and Filing Information** section displays case and envelope information, filer information, parties involved in the case, fees associated with the case, and filer's comments.

Click to collapse the information, or click to expand the information.

Figure 6.6 – Envelope and Filing Information Section

Edit Envelope Information

For new cases, envelope information can be edited by clicking the Edit button, located above the **Case Information** section.

Figure 6.7 – Edit and Verify Parties Toolbar

On subsequent filings, the party information cannot be edited. If you are reviewing a new case filing, review the submitted party information to confirm it is accurate before accepting the new case filing.

You can correct or extend the filing information based on the court procedures associated with e-filing or from information obtained within the documents submitted by the filer. For example, you can add an additional party referenced in the document to the filing, or you can correct the spelling of a party name to match the spelling in the submitted document.

You can also correct any of the filing domain items, such as case type or filing code.

Verify Party Information

The **Parties** section displays information regarding the parties connected to the case.

Click the Verify Parties button to view the party information.

The *Verify Parties* window opens.

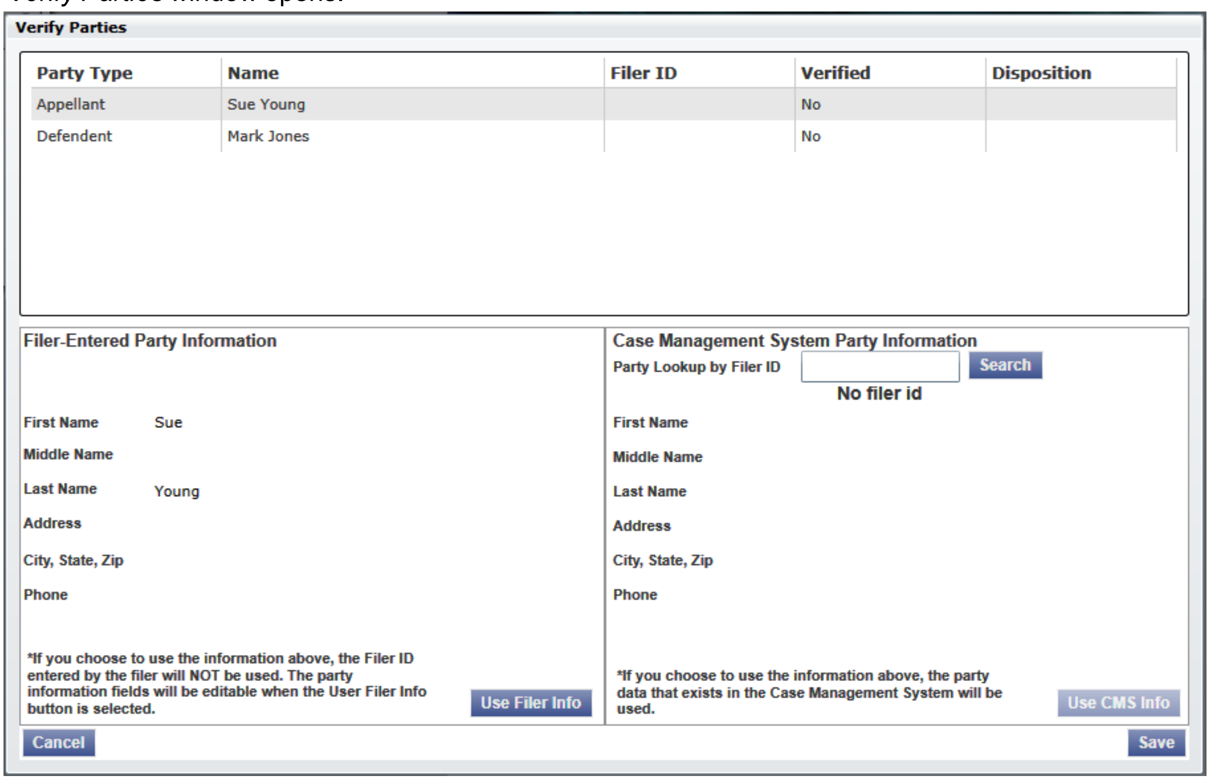


Figure 6.8 – Verify Parties Window

For new cases, the party information can be edited by clicking the Use Filer Info button in the **Filer-Entered Party Information** window. If you are reviewing a new case filing, ensure the party information is accurate before accepting the new case filing. For subsequent filings, the party information cannot be edited.

Filer-Entered Party Information

The **Filer-Entered Party Information** section displays the name and address of the party entered by the filer.

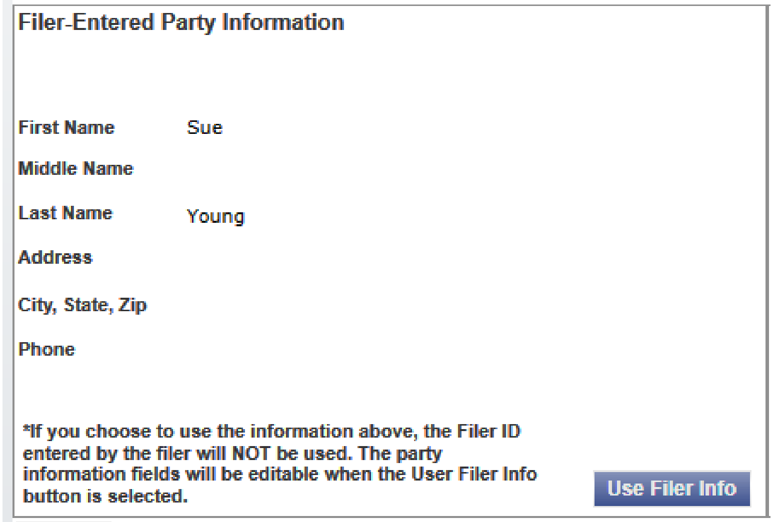


Figure 6.9 – Filer-Entered Party Information Section

Case Management System Party Information

The **Case Management System Party Information** section pulls filer information from the party information entered into Case Manager.

Enter the filer ID in the field provided, and then click the Search button to populate the fields.

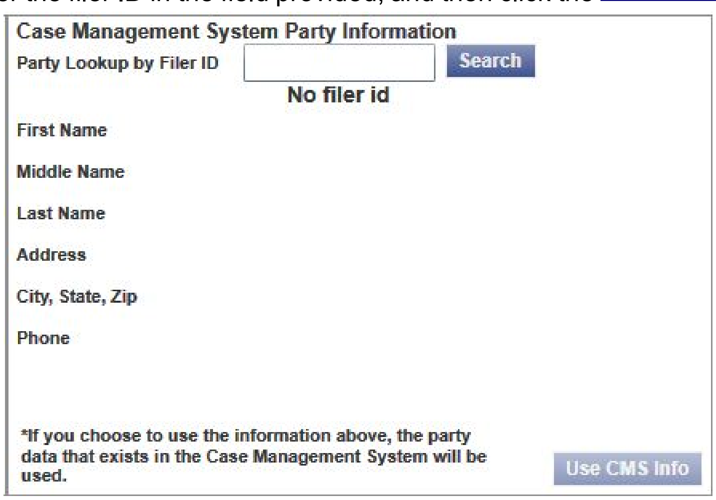


Figure 6.10 – Case Management System Party Information Section

Attachment Section

The **Attachment** section displays the lead documents and all other attachments for the case.

There may be one or more documents listed in the attachment section.

Figure 6.11 – Attachment Section

Determine which document you want to work, and click the link on the document to display the document in the **Document Display** window.

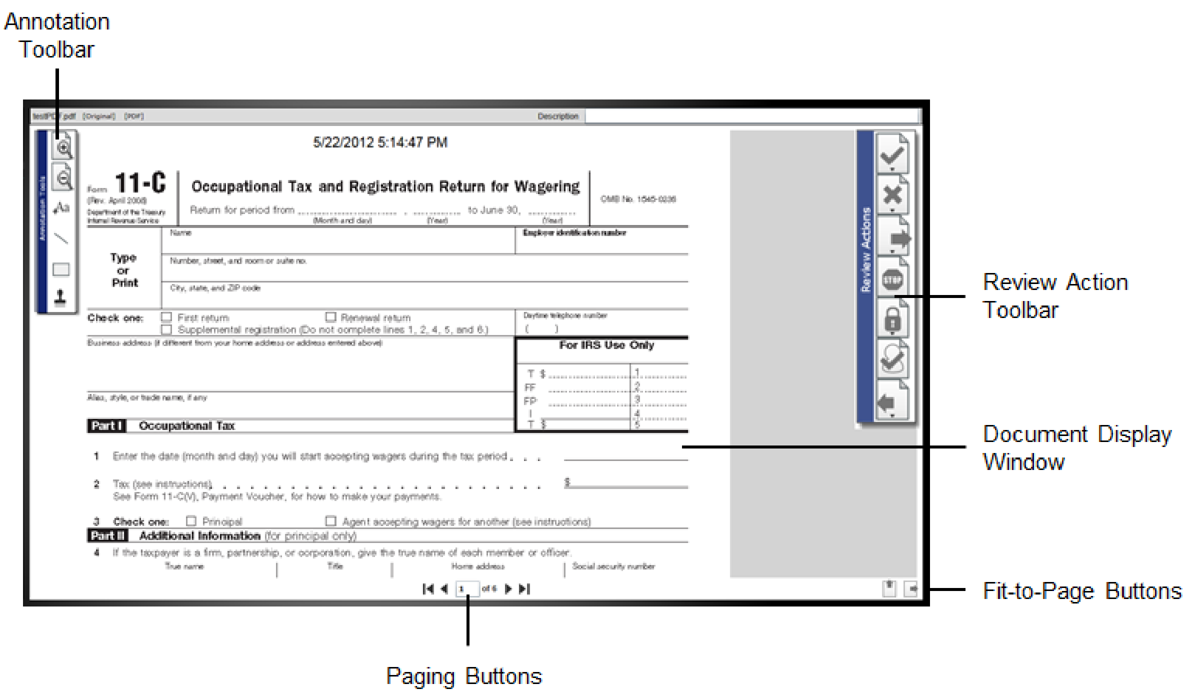


Figure 6.12 – Document Display Window

Review Case Information

The **Case Information** section displays the case filing information.

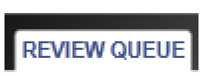
Figure 6.13 –

- Check the case information to make sure the information is correct.
- Check to see whether a judge is assigned to the case. If not, go to Manually Assigning a Judge to a Case, page 18 for the required steps.

Manually Assigning a Judge to a Case

You can manually assign a judge to a case using the manual judge assignment feature.

Perform the following steps to manually assign a judge to a case:

1. Select the 

tab on the toolbar.

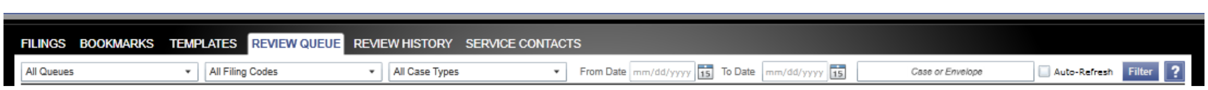


Figure 6.14 – Review Queue Selected

2. Select a judge from the drop-down list of judges in the **Case Information** section.

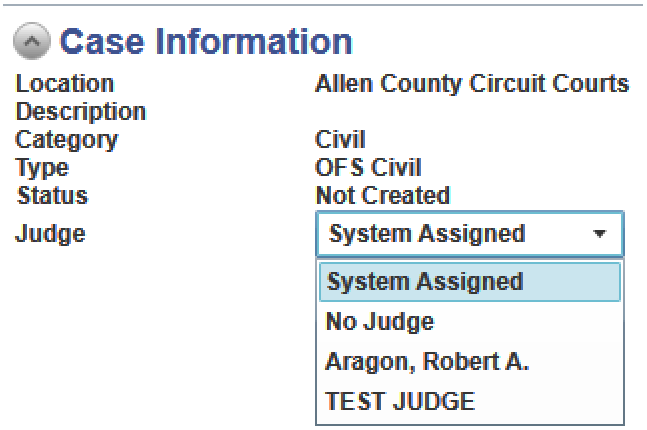


Figure 6.15 – Judge Selection Drop-down List

This action assigns the selected judge to the case.

Review Envelope Information

The **Envelope** section displays the envelope number for a new filing or the case number for a subsequent filing, the submitted and docket date, the filing attorney for the case and the type of payment account associated with the case.

Click the arrow to collapse the information, or click the arrow to expand the information.

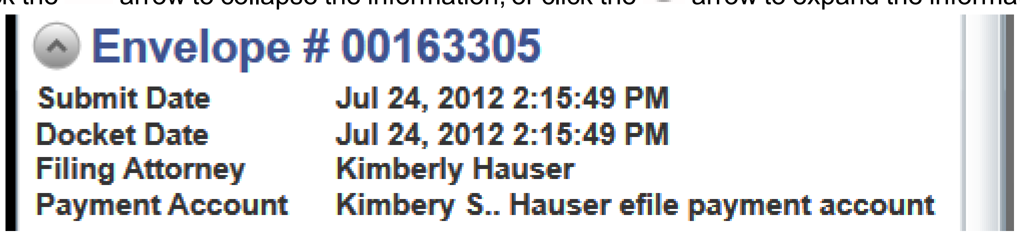


Figure 6.16 – Envelope Information Section

Review the envelope information to ensure the information is correct.

Edit Docket Date and Time

Select the underlined link under the date and time to edit the current docket date. This opens the calendar and clock.

Select a different docket date and time using the calendar and clock option.

Figure 6.17 – Docket Date Calendar

Filing Fees

The **Fees** section displays the filing fees set by the courts.

Note: If you are reviewing a new case filing, review the filing fees to confirm they are accurate before accepting the new case filing as this will charge the payment account when accepted.

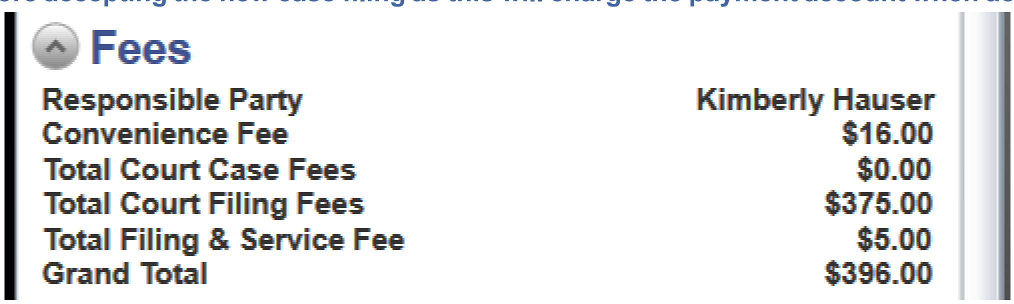


Figure 6.18 – Filing Fees

Filer Comments

The **Filer Comments** section includes any comments the filer may have added for the clerk reviewer to read.

Review the **Filer Comments** section for any comments the filer may have entered.

Figure 6.19 – Filer Comments Section

Performing Review Actions

The clerk reviewer can use the **Review Actions** toolbar to perform review actions on a filing.

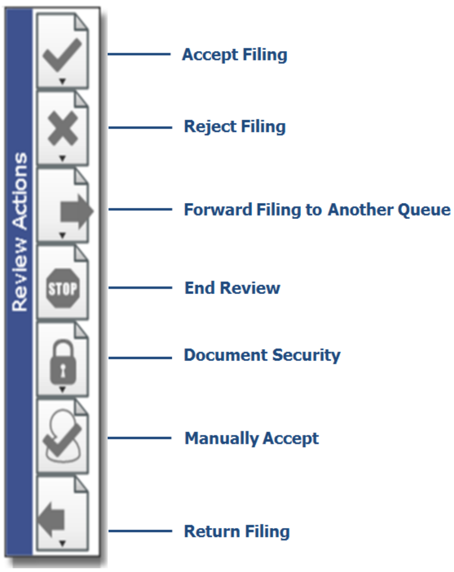


Figure 6.20 – Review Actions Toolbar

Note: The options available on the toolbar vary based on site requirements.

Accept Filing

Click the icon to accept the filing.

Figure 6.21 – Enter Case Number Window

Note: If prompted, enter the case number in the Case Information field in the format assigned by your court.

Figure 6.22 – Accept the Filing Icon and Comment Window

When you select the arrow on the bottom of the icon, the **Comment** dialog box opens.

You can type notes in the **Comment** field.

Reject Filing

Click the icon to reject the filing.

Figure 6.23 – Reject the Filing Icon, Select Reason and Comment Window

When you select the arrow on the bottom of the icon, the **Select Reason** dialog box opens.

You can select the reason from the drop-down list and enter additional notes regarding the rejection in the **Comment** field.

Forward Filing to Another Queue

Click the icon to forward the filing to another queue.

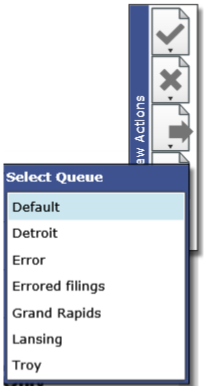


Figure 6.24 – Forward Filing Icon and Queue Selection Window

When you select the arrow on the bottom of the icon, the **Select Queue** dialog box opens. Select a queue from the list.

End Review

Click the  icon to end the review and return the filing to the queue without changing the status.

Document Security

Click the  icon to change the security of the document.
Note: The color changes when the icon is selected.

The **Select Document Type** dialog box opens.

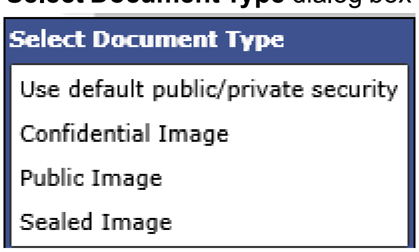


Figure 6.25 – Select Document Type Window

Note: This selection only affects security for the document displayed, not for the entire envelope.

Manually Accept

Note: Prior to the selecting the Manually Accept filing icon, create a case number in Odyssey to assign to the case you plan to manually accept. When you manually accept a filing, the case number is not automatically assigned to the initial case.

Click the  icon to manually accept the filing.

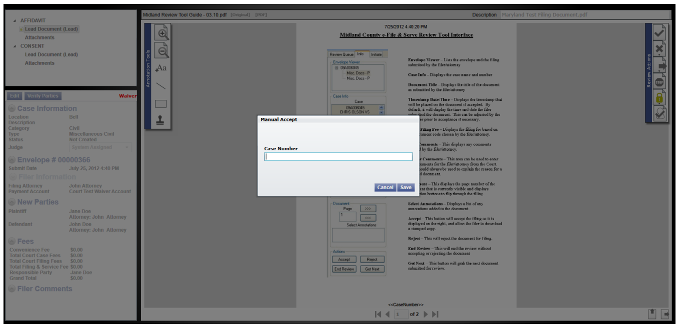


Figure 6.26 – Manually Accept Case Number Window

Note: When you manually accept a filing for a case, you must manually accept all filings associated with the case. All other steps regarding the docketing of the event, documents, fees and parties (case creation steps) must also be done manually by the reviewer in MNCIS to complete the filing process. The API is not sent when manually accepting a filing for a case.

Use this functionality when a filing will not process to MNCIS any other way due to errors, configuration issues, or other problems. This feature should be used with the full understanding that the following actions will occur every time:

- Manual accept requires a case number to be provided before the review is completed.
- The filing is marked as accepted.
- Service notifications are sent.
- Financial information is captured in Chase.

Return Filing

Click the  icon to return filings that have missing or incorrect information.

Note: The reviewer or court should contact the filer to let them know what corrections need to be made to the filing before the filing is returned to the filer.

Once the filing is returned to the filer, the following actions occur:

- The filing leaves the review queue.
- The filing status returns to the submitted status.
- The filing appears in the filer's filing queue with the submitted status and no notes to indicate the reason it was returned.

The filer must cancel the filing and copy either the envelope or file into the case and make the necessary changes to the filing and resubmit. This process generates a new envelope number and authorizes the filer's credit card a second time where necessary. The filer is not charged for the original envelope.

7 Review History

Review History is a main menu link visible to users with the reviewer role. The history list includes previously accepted and rejected filings processed by the current reviewer along with filings the reviewer has previously worked.

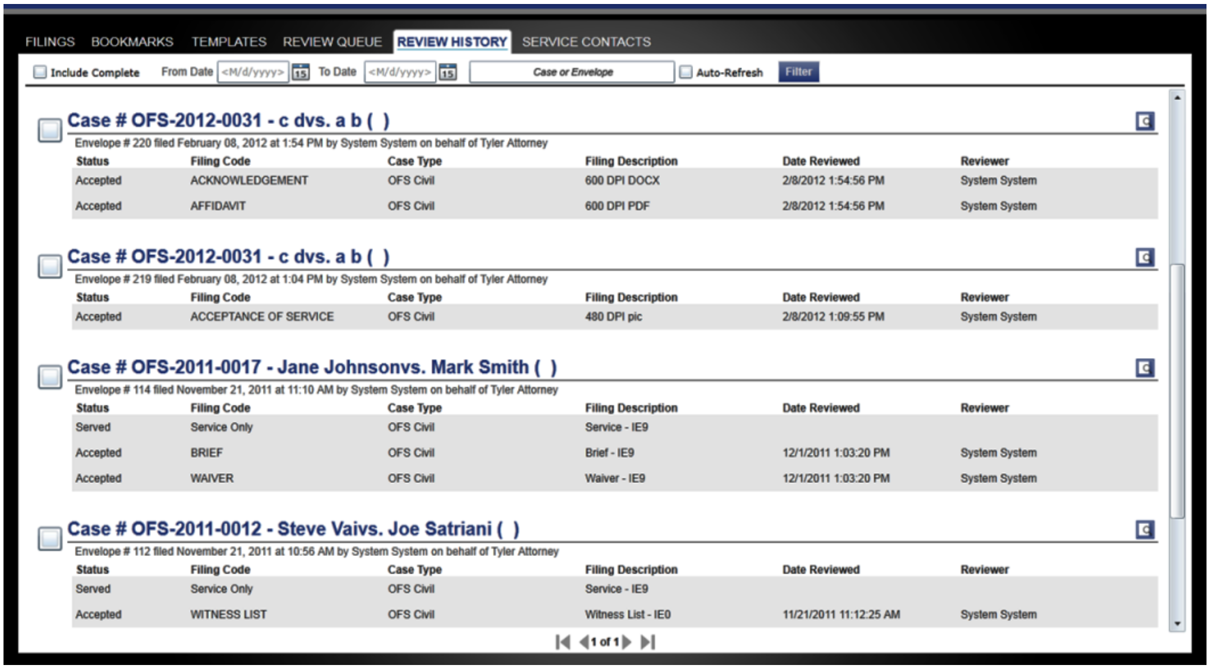


Figure 7.1 – Review History Window

Accessing the Review History

Click the REVIEW HISTORY tab on the toolbar.

Filtering Completed Reviews

Select the check box next to the envelope to mark it as complete and the envelope is immediately removed from Review History window.

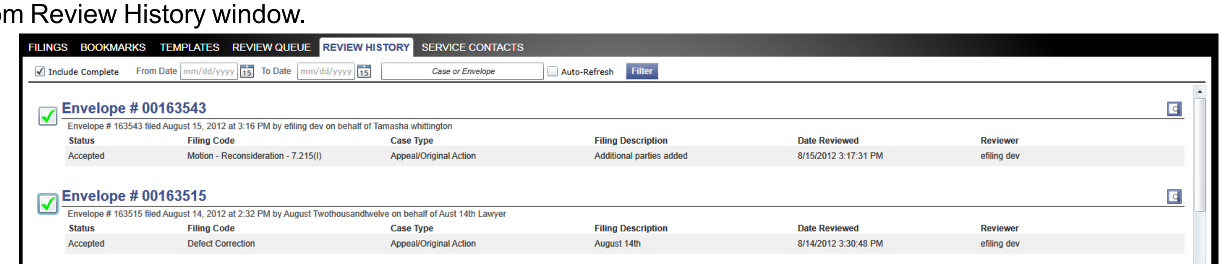


Figure 7.2 – Completed Check Box Selected

Filtering Using Include Complete

You can remove completed filings from the **Review History** window by deselecting the Include Complete check box, then clicking the Filter button.

To re-populate the completed filings back into your **Review History** window previously filtered out, select the ☑ Include Complete check box, then click the Filter button.